

State of Texas
Records Retention Schedule

Recertified: 5/23/2012 **Updated (with or without**
Amendment Approved: 2/19/2014 **amendment): 10/3/2017**

___ ORIGINAL SUBMISSION
X RECERTIFICATION
___ REPLACEMENT PAGE
___ ADDENDUM PAGE

Automated Facsimile of SLR-105

2. Agency Code: 537 3. Agency: Texas Department of State Health Services

4. Records Series Item #	5. Agency Item #	6. Records Series Title	7. Retention Period			8. Archival	9. Remarks	10. 106 No.
			Agency	Storage	Total			

824 - ENVIRONMENTAL AND CONSUMER SAFETY SECTION - ADMINISTRATIVE

	37	SPECIAL PROJECTS	3	3				
	5610	SPECIAL INVESTIGATION RECORDS	AC	AC			AC=NEEDED TO CONDUCT REGULATORY ACTIVITIES OR REVIEW.	
1.1	4046	MEDIA CONTACT REPORTS & INFORMATION	3	3				
1.1	4054	PARTNERSHIP AGREEMENTS	AV	AV			Vital Record.	
1.1	4055	INVESTIGATOR LOG BOOKS	AC	AC			AC=AFTER FINAL REPORT IS ENDORSED.	
1.1.002	4460	AUDITS (INCLUDES FDA EVALUATIONS)	AC+7	AC+7			AC=PUBLICATION OR RELEASE OF FINAL AUDIT FINDINGS. THE RECORD COPY OF ANY AUDIT PERFORMED BY THE STATE AUDITOR'S OFFICE IS RETAINED PERMANENTLY BY THE AGENCY.	
1.1.004	5066	BIENNIAL BUDGET - LEGISLATIVE APPROPRIATIONS REQUESTS	AC+6	AC+6	A		AC=SEPTEMBER 1 OF ODD-NUMBERED CALENDAR YEARS. ONLY COPIES OF SUPPORTING DOCUMENT SUBMITTED TO THE LEGISLATIVE BUDGET BOARD ARE ARCHIVAL.	
1.1.007	1025	CORRESPONDENCE, ADMINISTRATIVE (LIMITED TO FORMULATION, PLANNING, IMPLEMENTATION, INTERPRETATION, MODIFICATION, OR REDEFINITION OF THE PROGRAMS, SERVICES OR PROJECTS & THE ADMINISTRATIVE REGULATIONS, POLICIES AND PROCEDURES THAT GOVERN THEM.)	4	4	R		Vital Record. ONLY ADMINISTRATIVE CORRESPONDENCE OF EXECUTIVE STAFF, BOARD OR COMMISSION MEMBERS, DIVISION DIRECTORS AND SECTION/UNIT/BRANCH HEADS REQUIRE ARCHIVAL REVIEW.	
1.1.008	4988	GENERAL CORRESPONDENCE (LIMITED TO DOCUMENTING THE ROUTINE OPERATIONS OF THE POLICIES, PROGRAMS, SERVICES OR PROJECTS.)	2	2			Vital Record.	

RETENTION CODES (Field 7)

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US -Until Superseded	PM - Permanent	LA - Life of Asset

ARCHIVAL CODES (Field 8)

VITAL Record (Include in Field 9)

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1.1.010	569	GENERAL OFFICE PROCEDURES/DIRECTIVES (DOCUMENTATION THAT OFFICIALLY INITIATES, RESCINDS OR AMENDS GENERAL OFFICE PROCEDURES.)	US+1	US+1		(INITIATES, RESCINDS OR AMENDS GENERAL OFFICE PROCEDURES.)	
1.1.011	571	CHANGES TO REGULATIONS, POLICY/PROCEDURES, EXECUTIVE ORDERS	US+3	US+3	A	Vital Record.	
1.1.013	4498	ITINERARY INFORMATION, INCLUDING CALENDERS AND APPOINTMENTS	CE+1	CE+1	R	ONLY CALENDARS, APPOINTMENT, AND ITINERARY RECORDS OF EXECUTIVE STAFF, BOARD OR COMMISSION MEMBERS, DIVISION DIRECTORS AND SECTION/UNIT/BRANCH HEADS REQUIRE ARCHIVAL REVIEW.	
1.1.014	4025	LEGAL OPINIONS & ADVICE	AV	AV	R	AV=NEEDED TO CONDUCT REGULATORY ACTIVITIES OR REVIEW.	
1.1.019	21	NEWS OR PRESS RELEASES	2	2	R		
1.1.020	4365	PUBLIC INFORMATION REQUESTS - NOT EXEMPTED	AC+1	AC+1		AC=DATE REQUEST IS FULFILLED; INCLUDES WRITTEN REQUESTS FOR PUBLICATIONS (TEXAS GOVT CODE 552.002)	
1.1.021	1497	PUBLIC INFORMATION REQUESTS - EXEMPTED (DENIED)	AC+2	AC+2		AC=DATE OF DENIAL OF REQUEST	
1.1.023	697	ORGANIZATION CHARTS	US	US	A		
1.1.027	2625	LEGISLATION/FISCAL NOTES	AV	AV			
1.1.027	4237	PROPOSED LEGISLATION	AV	AV		AV=AFTER CURRENT SESSION PLUS 2 SESSIONS	

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1.1.040	4573	REPORTS, PAPERS AND SPEECHES - CONFERENCE	AC	AC	R	AC=END OF TERM IN OFFICE OR TERMINATION OF SERVICE IN A STATE POSITION.
1.1.043	4036	TRAINING MATERIALS	US+1	US+1		
1.1.048	4753	LITIGATION FILES	AC+1	AC+1	R	AC=AS APPLICABLE, DECISION OF AN AGENCY NOT TO FILE A LAWSUIT OR DECISION THAT A LAWSUIT WILL NOT BE FILED AGAINST IT ON A MATTER; DISMISSAL OF A LAWSUIT FOR WANT OF PROSECUTION OR ON MOTION OF THE PLAINTIFF; OR FINAL DECISION OF A COURT IN A LAWSUIT
1.1.055	4050	STRATEGIC PLANS	AC+6	AC+6	A	AC=SEPT 1 OF ODD-NUMBERED CALENDAR YEARS. ARCHIVAL REQUIREMENT MET BY SENDING REQUIRED COPIES OF COMPLETED AGENCY PLAN TO TEXAS STATE DEPOSITORY PROGRAM.
1.1.056	732	ADA DOCUMENTATION	3	3		
1.1.057	5093	TRANSITORY INFORMATION	AC	AC		AC=PURPOSE OF RECORD HAS BEEN FULFILLED. INCLUDES TELEPHONE MESSAGE NOTIFICATIONS & SOME E-MAIL CONTAINING ROUTINE INFORMATION USED FOR COMMUNICATION, BUT NOT FOR THE DOCUMENTATION OF A SPECIFIC AGENCY TRANSACTION.
1.1.060	5605	PUBLIC HEARING RELATED VIDEO/AUDIO RECORDINGS	AC	AC		AUDIO & VIDEO; AC=AS NEEDED TO ANSWER HEALTH/MEDICAL PROBLEMS RELATED TO DEVICE, DRUG & COSMETIC SALVAGE BROKERS & ESTABLISHMENTS
1.1.062	5604	PUBLIC HEARING RELATED DOCUMENTS	AC	AC		AC=AS NEEDED TO ANSWER HEALTH/MEDICAL PROBLEMS RELATED TO DEVICE, DRUG & COSMETIC SALVAGE BROKERS & ESTABLISHMENTS

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1.1.063	145	STAFF MEETING NOTES / MINUTES	1	1				
1.1.064	2611	PERFORMANCE MEASURES DOCUMENTATION EMPLOYEE WEEKLY ACTIVITY REPORT	FE+3	FE+3			Vital Record. DOCUMENTATION OF OUTPUT, OUTCOME, EFFICIENCY AND EXPLANATORY MEASURES IN AGENCY'S APPROPRIATIONS REQUEST OR STRATEGIC PLAN & PERFORMANCE MEASURES TO MANAGE AGENCY.	
1.1.065	1551	RAW DATA FOR REPORTS, STUDIES, AND SURVEYS, PAPERS (CONFERENCE) - NON-FISCAL REPORTS	AV	AV			AV=NEEDED TO CONDUCT REGULATORY ACTIVITIES OR REVIEW	
1.1.067	32	ANNUAL / BIENNIAL / QUARTERLY REPORTS AND STUDIES (NON-FISCAL) AND PROGRESS REPORT	3	3	R		MISCELLANEOUS NON-FISCAL REPORTS. IF REPORT HAS HISTORICAL RELEVANCE, DO NOT DESTROY REPORT BUT SEND IT TO THE STATE ARCHIVIST AT THE END OF THE RETENTION PERIOD.	
1.1.068	2635	REPORTS: PERFORMANCE & FUNDS MANAGEMENT, PERFORMANCE MEASURES	AC+6	AC+6			AC=SEPTEMBER 1 OF ODD-NUMBERED CALENDAR YEARS	
1.1.069	5067	ACTIVITY OR WORKLOAD MONITORING (WORK SCHEDULES)	1	1				
1.1.070	726	RULES, REGULATIONS, POLICIES & PROCEDURES- FINAL (INCLUDING INTERNAL, FDA COMPLIANCE)	AC+3	AC+3	R		Vital Record. AC=COMPLETION OR TERMINATION OF PROGRAM, RULES, POLICIES OR PROCEDURES.	
1.1.071	5741	RULES -WORKING FILES	AC+3	AC+3	R		Vital Record. AC=COMPLETION OR TERMINATION OF PROGRAM, RULES, POLICIES OR PROCEDURES. STAKEHOLDERS MEETING, FOCUS / WORKGROUP MEETING	
1.2.003	6249	FORMS HISTORY FILE	AC+1	AC+1			AC=DISCONTINUANCE OF USE OF FORM	

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1.2.006	736	RECORDS TRANSMITTAL FORMS	AC+2	AC+2			AC=DATE OF AUTHORIZATION FOR DESTRUCTION OR TRANSFER
1.3.001	4271	STATE PUBLICATIONS	AC+2	AC+2			AC=UNTIL SUPERSEDED OR OBSOLETE. FOR NEW PUBLICATIONS PRINTED AT HHS PRINTING, HHS PRINTING SENDS COPIES TO STATE PUBLICATIONS CLEARINGHOUSE/DSHS LIBRARY. FOR NEW PUBLICATIONS PRINTED ELSEWHERE, SEND COPIES TO HHS PRINTING FOR DISTRIBUTION TO CLEARINGHOUSE / LIBRARY.
1.3.002	4523	PUBLICATION DEVELOPMENT FILES	AV	AV		R	
2.2.016	6963	SOFTWARE REGISTRATIONS, WARRANTIES, AND LICENSE AGREEMENTS	LA+3	LA+3			Vital Record.
3.1	1555	INVENTORY WORKSHEETS FOR ISSUED EQUIPMENT & SUPPLIES	US	US			AC=EMPLOYEE TERMINATES (CONVENIENCE COPY)
3.1	6744	POSITIVE PERFORMANCE RECORDS (MAINTAINED BY SUPERVISORS)	AC	AC			AC=FIRST LEVEL REMINDER IS 3 MONTHS; SECOND LEVEL REMINDER IS 6 MONTHS WITH A COPY TO EMPLOYEE'S MASTER EMPLOYEE FILE; THIRD LEVEL REMINDER IS 12 MONTHS WITH A COPY TO EMPLOYEE'S MASTER EMPLOYEE FILE. BEGINING AUGUST 2005 SUPERVISORS USE Employee Development Notes IN CAPPs TO DOCUMENT SECOND AND THIRD LEVEL REMINDERS, BUT A PAPER COPY IS STILL FORWARDED TO HHSC HR FOR EMPLOYEE'S MASTER PERSONNEL FILE.
3.1.006	6251	EMPLOYEE COUNSELING RECORDS	AC+3	AC+3			AC=TERMINATION OF COUNSELING. KEEP THIS RECORD SEPARATE FROM PERFORMANCE APPRAISAL.

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3.1.013	5140	EMPLOYMENT CONTRACTS - TEMPS/TELECOMMUTING	AC+7	AC+7	Vital Record. AC=TERMINATION OF CONTRACT
3.1.014	972	EMPLOYMENT SELECTION RECORDS / NOTES (INCLUDES APPLICATIONS FOR EMPLOYMENT-NOT HIRED)	2	2	Vital Record maintained by CAPPs only. Send all records to CAPPs. CAPPs HAS FULLY ASSUMED THIS FUNCTIONALITY AS OF SEPT 2006.
3.1.018	1073	GRIEVANCE RECORDS	AC+2	AC+2	Vital Record maintained only by HHS-Civil Rights.. MAY CONTAIN CONFIDENTIAL DATA; AC=FINAL DECISION ON GRIEVANCE. BECAUSE OF CONSOLIDATION OF HUMAN RESOURCES IN HHS ENTERPRISE, MAINTAINED IN HHS-CIVIL RIGHTS
3.1.019	1087	PEFORMANCE APPRAISALS/JOURNALS	AC+5	AC+5	MAY CONTAIN SOME CONFIDENTIAL INFORMATION SUCH AS MEDICAL INFORMATION, SOCIAL SECURITY NUMBER, OR OTHER DATA PROTECTED BY THE PRIVACY DOCTRINE. AC=TERMINATION OF EMPLOYEE. CAPPs ASSUMED THIS FUNCTIONALITY IN AUGUST 2005. HHS-HR MUST RECEIVE ALL PERFORMANCE APPRAISALS THAT ARE NOT ALREADY IN CAPPs. HHS-OGC REQUESTED LONGER RETENTION PERIOD.
3.1.023	1169	POSITION/JOB DESCRIPTIONS	AC+4	AC+4	Vital Record. AC=UNTIL SUPERSEDED OR JOB ELIMINATED. AccessHR ASSUMED THIS FUNCTIONALITY IN AUGUST 2005.
3.2	2612	PAYROLL WARRANT LISTINGS	FE+5	FE+5	
3.3	1196	TRAINING SUPPORT DOCUMENTATION	AC+2	AC+2	AC=COMPLETION OF CLASS
3.3.015	101	PERSONNEL AUDITS	US+3	US+3	CONVENIENCE COPY

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3.3.020	784	WORK SCHEDULES/ASSIGNMENTS / FLEXIBLE WORK SCHEDULES	1		1		MAY CONTAIN CONFIDENTIAL INFORMATION	
3.3.023	728	REIMBURSABLE ACTIVITIES	FE+3		FE+3		INCLUDES TRAVEL, UNENCUMBERED FORMS. TRAVEL OFFICE ASSUMED RETENTION OF TRAVEL REQUESTS BEGINNING OCTOBER 2005.	
3.3.025	6254	JOB PROCEDURE RECORDS	US+3		US+3			
3.3.026	1199	STAFFING REPORTS	US+3		US+3			
3.3.030	4768	STAFF TRAINING ADMINISTRATION RECORDS	US+2		US+2		(MATERIALS AND RECORDS FOR INHOUSE TRAINING OF AGENCY PERSONNEL OF POLICES AND PROCEDURES.) TRAINING MATERIAL NOT FOUND IN TRAIN OR CAPPS. (DOES NOT INCLUDE HAZARDOUS MATERIAL TRAINING RECORDS).	
3.3.031	50	EEO REPORTS & SUPPORT DOCUMENTATION	3		3			
3.4.004	1210	OVERTIME AUTHORIZATIONS	FE+5		FE+5		BEGINNING OCTOBER 2005, RECORDS KEPT IN CAPPS.	
4.1.004	2645	ENCUMBRANCE DETAIL	FE+3		FE+3			
4.2.002	6734	DAILY REMITTANCES	FE+3		FE+3			
4.2.004	2646	ENCUMBRANCE VOUCHERS	FE+3		FE+3			
4.2.005	6258	PURCHASES	FE+3		FE+3		(PURCHASE VOUCHERS)	
4.3.002	2647	RECEIPTS, JOURNALS, OR REGISTERS	FE+3		FE+3			

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4.4	3715	REMITTANCE REPORTS	FE+4	FE+4				
4.4.002	2649	ACCOUNTS RECEIVABLE - OVERTIME	FE+3	FE+3		Vital Record.		
4.5	1	BUDGET REQUESTS/REPORTS	6	6		Vital Record.		
4.7.002	2615	BANK STATEMENTS (PROCARD STATEMENTS)	FE+3	FE+3				
5.1.001	2661	CONTRACTS (LABORATORY/OTHERS, PERFORMANCE BASED/FEDERAL GRANTS)	AC+7	AC+7		Vital Record. AC=EXPIRATION OR TERMINATION OF THE INSTRUMENT ACCORDING TO ITS TERMS		
5.1.003	378	DELIVERY REPORTS	2	2				
5.1.004	541	MAIL AND TELECOMMUNICATIONS LISTINGS	US	US				
5.1.007	2663	REQUISITION FOR IN-AGENCY /INTER-AGENCY COPY/PRINTING SERVICE	AV	AV				
5.1.011	1258	PHOTOCOPIER AND TELEFAX USAGE LOGS & REPORTS	AV	AV				
5.1.014	288	OFFICE PROCEDURES	US+1	US+1				
5.1.015	373	LOGS FOR CORRESPONDENCE/PACKAGES FROM US POSTAL SERVICE OR PRIVATE COURIERS / CERTIFIED MAIL BOOKS	1	1				
5.2.008	391	EQUIPMENT HISTORY FILE; EQUIPMENT SERVICE AGREEMENTS	LA+3	LA+3				

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5.2.009	199	INVENTORY REPORT	FE+3	FE+3		CONVENIENCE COPY. RECORD HOLDER IS EXECUTIVE AND STAFF OPERATIONS.
5.2.010	1261	EQUIPMENT MANUALS	LA	LA		
5.2.014	1263	INVENTORY - ANNUAL PHYSICAL	FE+3	FE+3		
5.2.015	1540	INVENTORY, NOTICES OF EQUIPMENT REMOVED FORM	FE+3	FE+3		
5.2.016	5105	INVENTORY SYSTEM UPDATE LISTINGS	AC	AC		AC=TRANSFER OF INFORMATION INTO ANNUAL LISTING
5.2.017	1541	LOST AND STOLEN PROPERTY REPORTS	FE+3	FE+3		
5.2.023	1545	YEAR-TO-DATE ACTIVITY (INVENTORY LISTING)	FE+3	FE+3		
5.2.025	2673	EQUIPMENT SPECIFICATIONS (PURCHASING DOCUMENTATION)	AC+2	AC+2		AC=EQUIPMENT IS NO LONGER IN THE AGENCY
5.3	209	OFFICE SUPPLY REQUESTS	FE	FE		
5.3	2675	PROCUREMENT CARD PURCHASES SUPPORTING DOCUMENTATION	FE+3	FE+3		
5.3	3174	SUBSCRIPTIONS	FE+1	FE+1		
5.3.002	2676	FREIGHT BILLS PAID	FE+3	FE+3		
5.3.003	2677	FREIGHT CLAIMS	AC+2	AC+2		AC=RESOLUTION OF CLAIM

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5.3.005	2616	PACKING SLIPS	AV	AV			
5.3.007	2679	BID/PURCHASING DOCUMENTATION	FE+3	FE+3			
5.3.008	2680	PURCHASING LOGS	FE+3	FE+3			
5.3.009	1938	REQUESTS FOR INFORMATION (FOR PURCHASES)	AC	AC		AC=DATE OF DIRECT PURCHASE, ISSUANCE OF REQUEST FOR BIDS OR DECISION NOT TO PROCEED WITH THE PROCUREMENT, AS APPLICABLE.	
5.4.012	2609	SECURITY ACCESS RECORDS	AC+2	AC+2		Vital Record. KEYS, CARDS, LOGS, ACCESS/IDS, FDA & DIVISION BADGES. AC=UNTIL SUPERSEDED, DATE OF EXPIRATION, OR DATE OF TERMINATION, WHICHEVER SOONER.	
5.4.013	733	DISASTER PREPAREDNESS AND RECOVERY PLAN	US	US		Vital Record.	
5.5.002	455	FAX LOGS/LONG DISTANCE LOGS	AV	AV			
5.5.003	2610	INCOMING/OUTGOING INDIVIDUAL TELEPHONE ACTIVITY	AV	AV		INCLUDES COUNT OF RECEPTION DESK	
5.5.007	573	DISPUTED CALL DOCUMENTATION	FE+3	FE+3			

RETENTION CODES (Field 7)

AC - After Closed, Terminated, Completed, Expired, Settled	CE - Calendar Year End	MO - Months
AV - As Long As Administratively Valuable	FE - Fiscal Year End	DA - Days
US - Until Superseded	PM - Permanent	LA - Life of Asset

ARCHIVAL CODES (Field 8)

VITAL Record (Include in Field 9)

A - Transfer to State Archivist
R - Review by StateArchivist
E - Exempt from sending